Resource Service Organiser

Administrators' Guide

DRAFT V0.52

Contents

Introduction

Quick over-view of system structure

Organisation

RSO handles three types of item:

- Lending - borrowed for a period then returned
- Supply - given away in quantities
- Information - 'virtual' information - no physical action

Databases

There are three main databases in RSO:

- your clients
- your resource items (lending, supply and information items)
- bookings and orders

These are the main working databases that are changing during the day.

Lists

There are also a multitude of smaller auxiliary databases and lists, such as:

- database of administration staff
- database of resource suppliers
- database of special holidays (bank holidays, closed periods, etc.)
- list of resource topics
- list of resource audience target groups
- list of client occupations (for statistics)
- list of client work areas (for statistics)

These are set up during the commissioning process when you first start using RSO. Once set up they very rarely need to be altered.

Basic Use

- RSO consists of pages, one for each function.
- Most pages consist of a list of items with options to select and action them, such as Deliver Items, Return Items, Modify/Add, etc.

Web Addresses

Administration

The web address for the Admin (Administration) side of RSO is:

____.resourcesorg.co.uk/Admin

where '____' is the code for your resources unit.

You will be given the code when the site is first ready to use.

e.g. Berkshire is: bhps.resourcesorg.co.uk

The Demo site is: demo.resourcesorg.co.uk

Clients

The address for the Client side is:

____.resourcesorg.co.uk/Client

This is where the public users (clients) can log in, browse the catalogue and make bookings.

When you first go to the Admin site you will see the log-in page. Each of your staff should have their own separate log-in details as this is more secure.

When you first start using RSO an initial log-in will be provided to gain access.

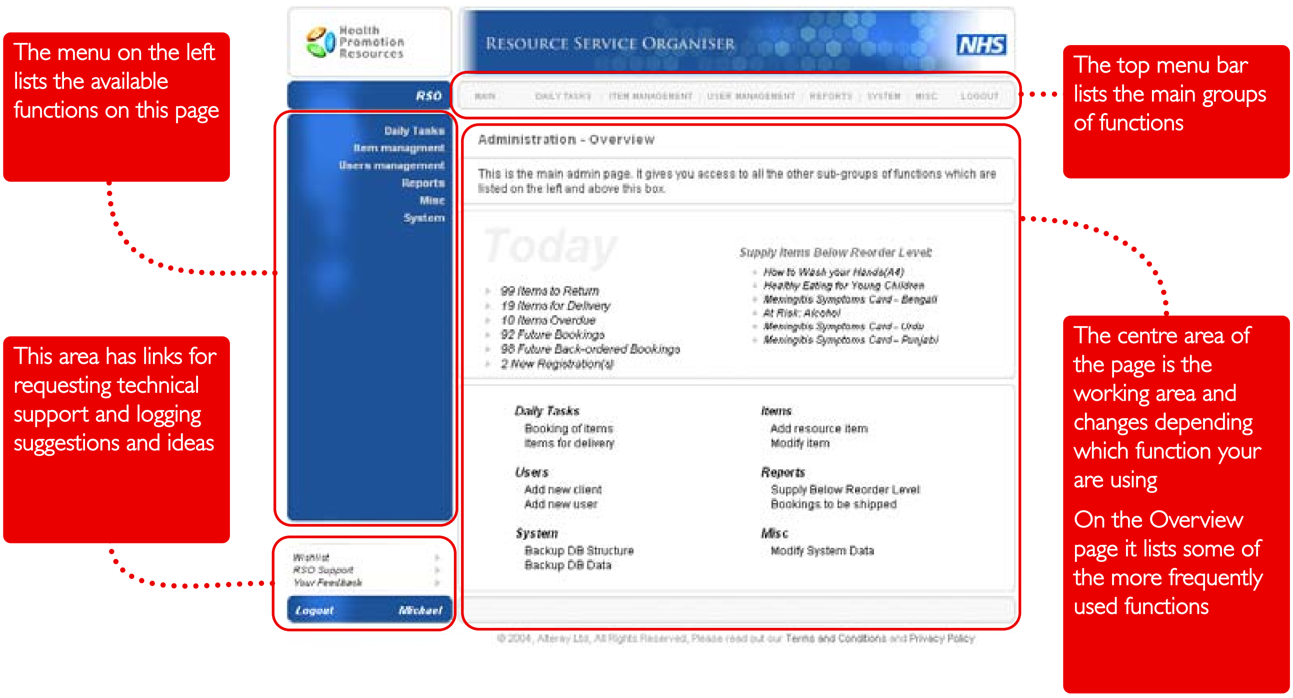
Once logged in you will see the Main 'Administration Overview' page as shown below.

The Admin. system consists of a series of pages, each with a list of links to functions for doing various actions. The functions are divided across six pages, grouped by actions of similar use.

Basically each page of functions amend one of the databases, e.g. bookings functions, library item functions, client detail functions, etc.

There are four main areas on all the Admin pages

The Admin. menu pages are divided into four sections.



The menu bar lists the function group pages. Click the name to go to the relevant page.

Their use is as follows:

Main

This is an overview page for convenience, that includes some of the frequently used functions from the other pages.

Daily Tasks

This page has the functions for amending the bookings database such as bookings, orders, overdues, etc.

Item Management

These are the functions for amending the library items database, e.g. adding new resource items or amending existing ones.

User Management

This is for amending the clients database, e.g. amending details of existing clients, approving new registrations, or registering new clients.

It also has the functions for maintaining the list of staff that can access the Admin. functions.

System

This page has some special functions, for doing technical tasks such as backing-up your data. Backups are made automatically at the Internet server, but it is advised to make local backups too.

Misc

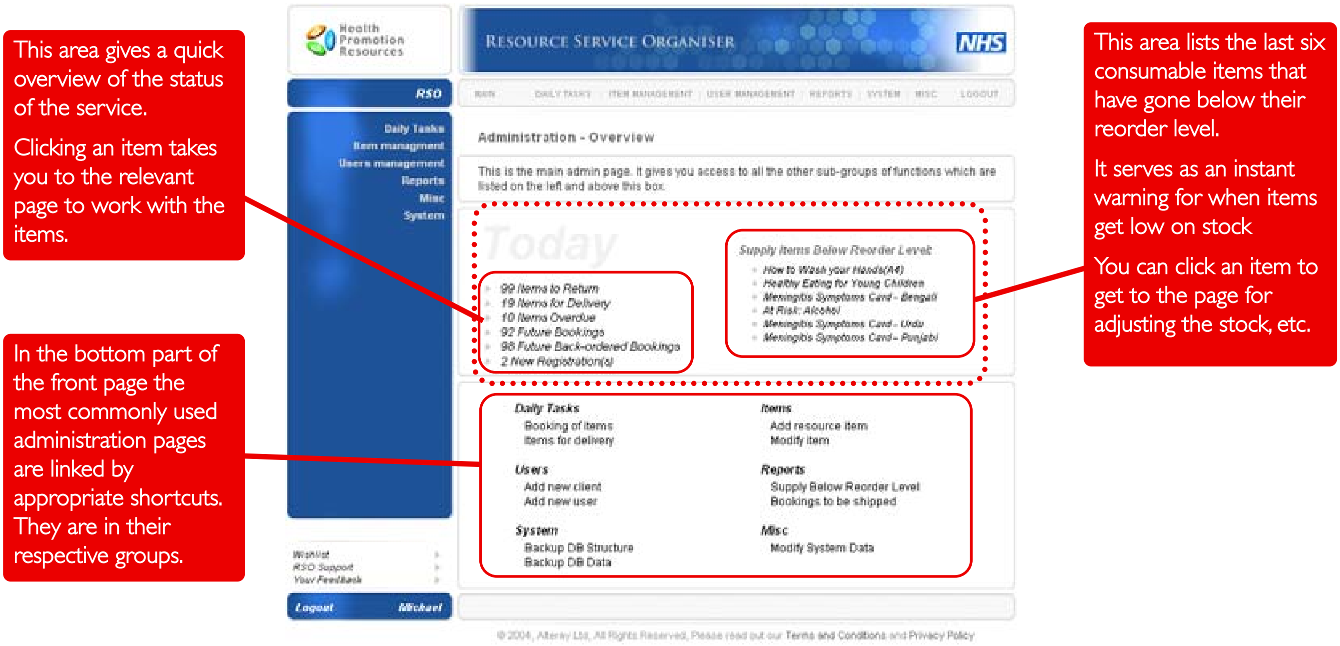
This page has the functions for amending the auxiliary information and lists, such as topic lists, closures and holidays, maximum allowed lending period, delivery method details... and many more. There are a great many background settings in RSO and they are all found here.

Most of this is set up once, when you start using the system, and then changed very rarely.

The 'Main' and 'Daily Tasks' page have a quick overview panel labeled 'Today'

Today Panel

The Today panel informs you about important changes in the system and provides quick access to the most commonly used functions. It lists a quick count of the number of items for return, delivery, overdue, future bookings, future backorders and new client registrations. It also lists supply items that have recently gone below their reorder level.



Common Shortcuts

Return items
This is the function for logging items as having been returned. It also acts as a list of all items that are currently out with clients.

Items for delivery
This lists all the items that need to be sent out today, and has the functions for 'delivering' them, i.e. logging them as 'with the client' and printing delivery notes.

Items overdue
This lists the items, currently out, that are overdue for return, and has a function to send reminder emails to the clients.

Booking of items
For making bookings and orders on behalf of a client.

Future bookings (and Cancel bookings)
This lists all the live bookings/orders currently in the system that have not yet been 'delivered', i.e. it lists every booking apart from those in the 'Return items' list. (It also omits the backorders.) It has a function to select and delete bookings.

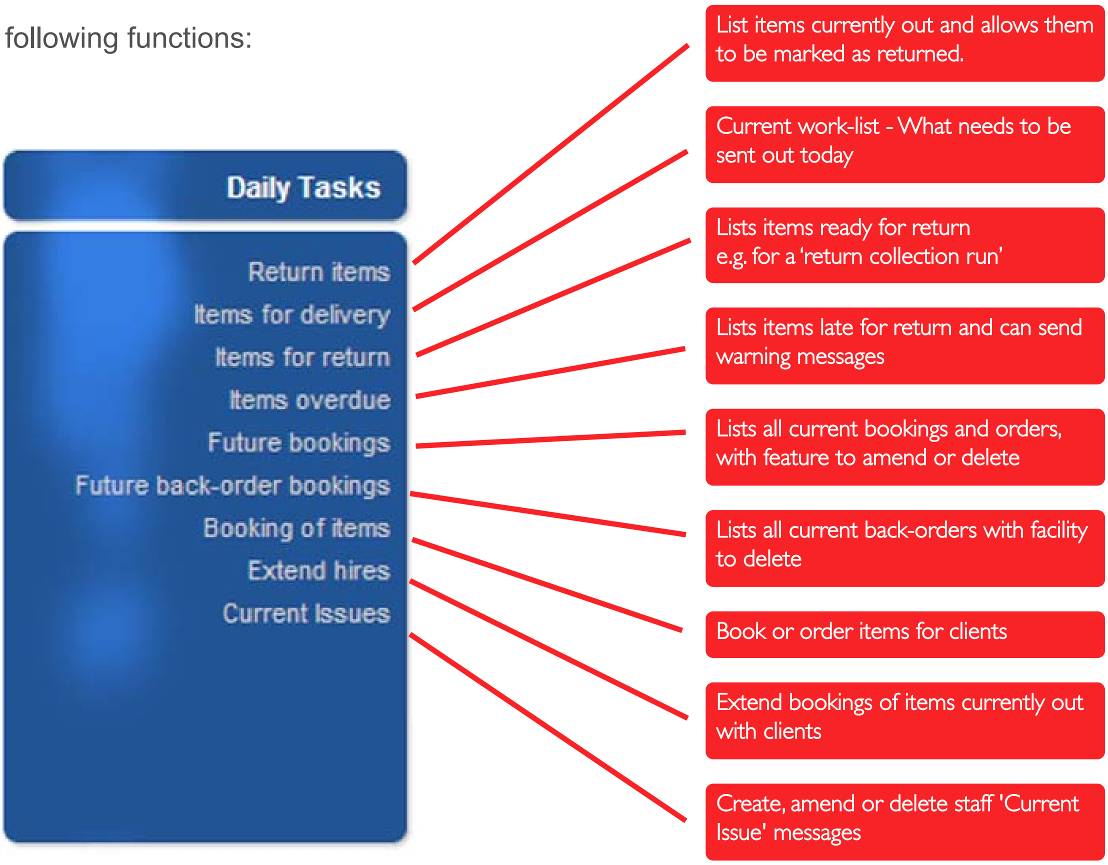
Future back-order bookings
This lists all the back-orders currently in the system and has a function to select and delete orders. When new stock is received, any backorders that can be fulfilled move into the 'Items for delivery' list.

Extend hires
This function lists the items currently out with a particular client and allows you to extend bookings if the items are still free.

2. Daily Tasks

The Daily Tasks page has the functions for running the daily work of the office, e.g. making bookings, checking orders and bookings, checking what needs to come back, etc.

It has the following functions:

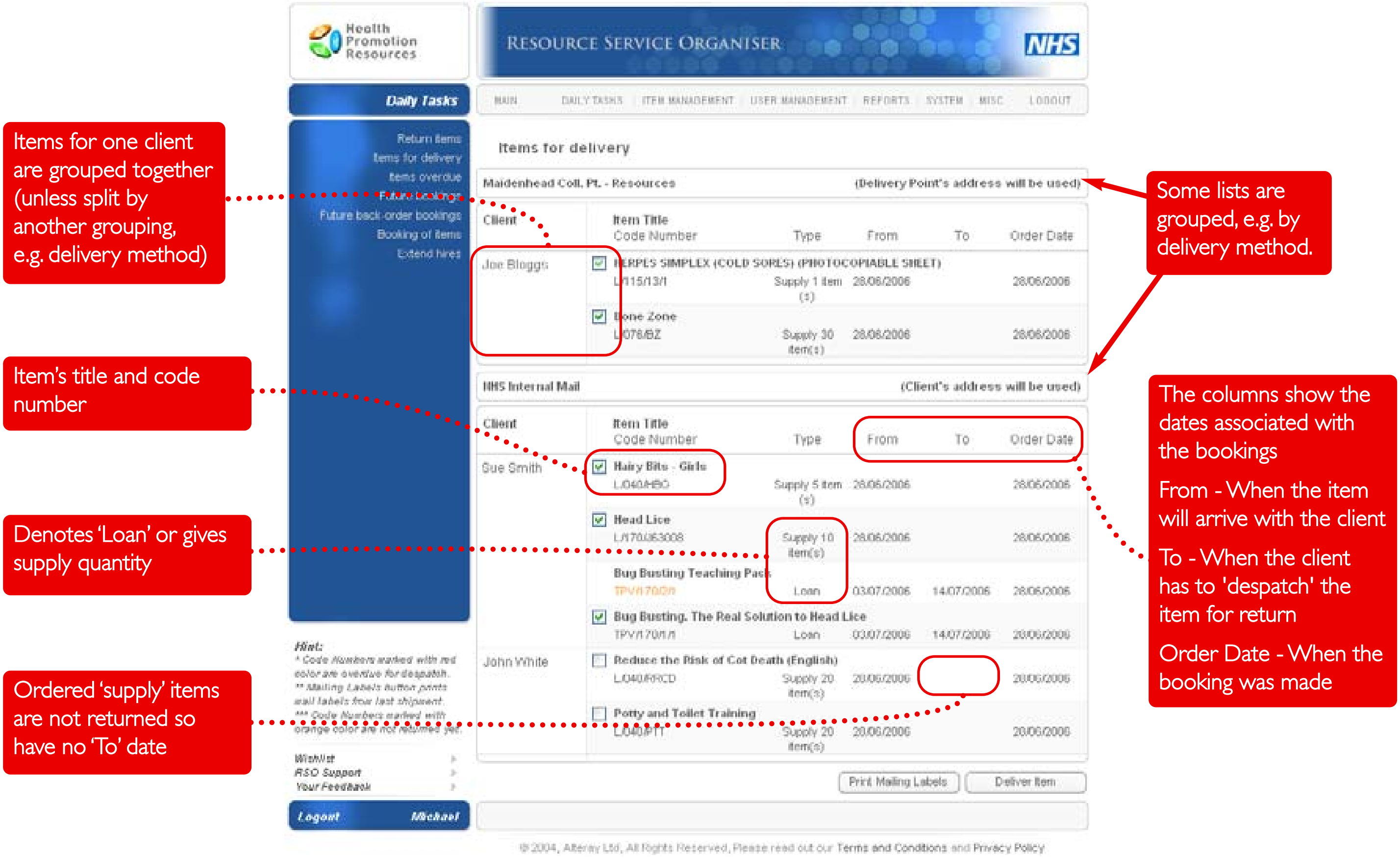


The functions are described in detail in the following sections.

Using list pages

Many of these pages work via a list of bookings and orders. All these lists work in a similar way so this page explains the common features.

This is the **Items for Delivery** list as an example.



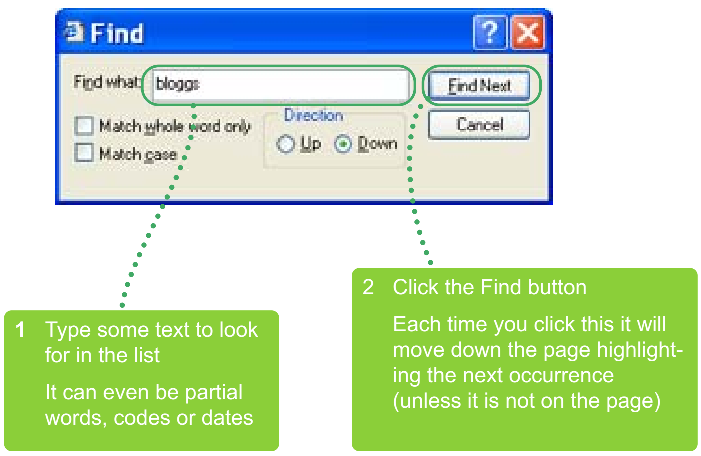
Searching Long Lists

Sometimes the lists can be long. To find entries on a long list you should use the browser 'Find on page' feature. This is a feature of the web browser, not RSO. Most browsers have a function like this.

It is usually found in the 'Edit' menu, or type 'ctrl'-F on the keyboard.

You will get a small window or text box, similar to this one from MS Internet Explorer. It will search the current page for the text you have entered.

You can search for any of the information included in the list, e.g. client name, resource title, resource code, a date, etc., so it is very flexible.



Return Items

Purpose

1 - Used when items are returned from a client. It registers the items as 'back' on the system - no longer with the client.

2 - Used to list all items currently out with clients.

Tip

If the list is very long then use the 'Find on page' browser function as described earlier. You can search for all or part of the item title, the code number, the client's name or even booking/return dates.

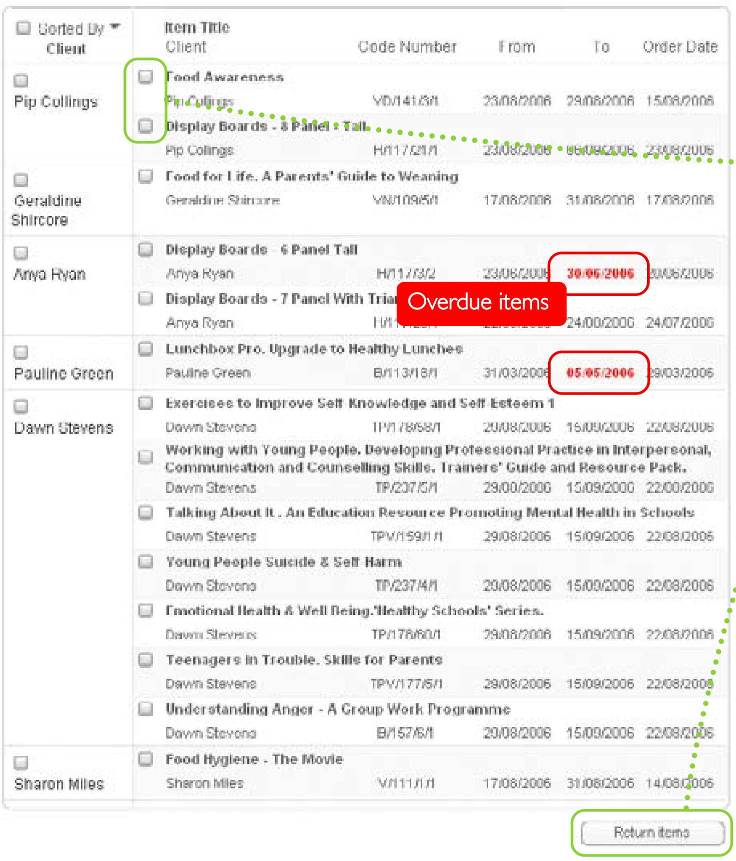
The page will move down to, and highlight, the first matching piece of text.

Feature

Overdue items have due dates marked in red to highlight them.

This page is used for marking items as returned. It lists all the items that are currently out with clients. From this page you can select either a single item, by using a check-box next to its name, or multiple items. Alternatively you can use a check-box next to a user's name to automatically select all the items with that user.

The items are grouped by user.



1 Find the user or items required. Use browser Find option if the list is long.

2 Tick the item/s that have come back

3 Click the 'Return Items' button

Items for Delivery 1 of 2

Purpose
Lists the items that need to be sent out today.

Allows the items to be 'delivered' and provides mail-merge information for printing delivery notes. Sends email to client/s informing them of despatch of their orders.

Tip
This needs to be checked a few times during the day since a client could place an order at any time that needs to be dispatched today.

Warning
This function can only be used by ***one Admin staff at a time***.

If another user ticks and delivers items before the first merge list has been downloaded then it will overwrite the first one which will be lost.

Information
Several factors control which bookings appear in this list.

See **Appendix 2** for details.

This function causes several actions when used on selected items:

- **Lending items** are switched to being 'out', in possession of the client. They transfer to the Return Items list until they are returned.
- **Supply items** have their order quantity removed from the stock level.
- An email is sent to the client/s, listing the items processed, and informing them that the items have been despatched. Message template text is set in **Misc > Mail Templates** section.
- Produces the delivery notes to be sent out with the items.

The screen displays Client's name, items ordered and date of delivery. Each item is on a separate line.

1 Tick the items you wish to deliver

You can select any combination of items and items can be left for later if required

2 Click the Deliver button

Items in orange are still out, overdue for return from the previous client. These can't be delivered so have no tick box.

Click the orange code to see who has it.

Reproduce Previous List

This button downloads a copy of the previously produced list of deliveries. It does not perform any actions with the current list.

cont...

Items for Delivery 2 of 2

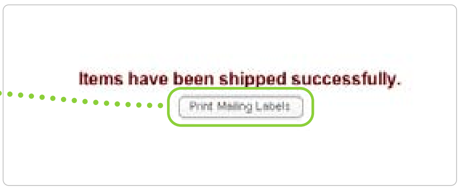
These next steps require that you have your delivery note mail-merge documents set up correctly. See the 'Set up' box for more details.

You will be provided with a working delivery note which you can customise.

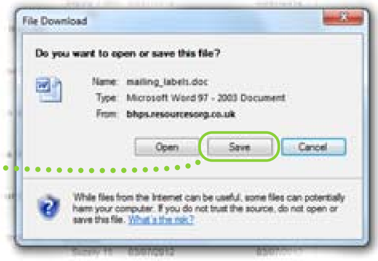
3 Minimise RSO and go to the folder where your mail-merge documents are. Then delete the previously downloaded file.

Tip
It is possible to overwrite when downloading, but deleting is useful as it keeps previous merge files in your PC Recycle Bin in case you need to refer back.

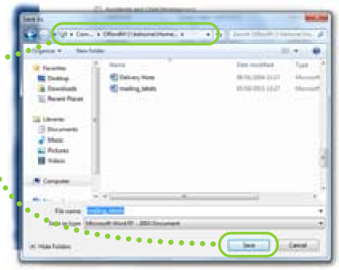
4 Return to the RSO browser window and click the 'Print Mailing Labels' button.



5 Choose to 'Save' the file.

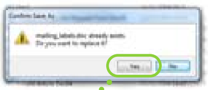


6 Check that the location is correct (your RSO mail-merge folder) and click 'Save'.

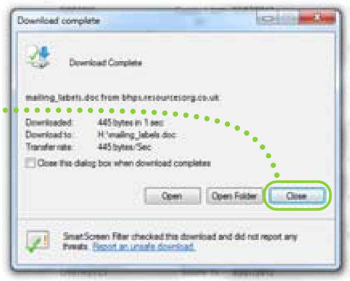


Tip
The save file window remembers the previously used location.

6 If you haven't deleted the previous mailing_labels file then you will have to say 'Yes' to overwrite it.



7 When complete, click 'Close'.



Set-up Mail-merge

Mail-merge requires a pair of linked files:

1. A main Word document is the template defining the layout for the delivery notes.
2. A data file - this is downloaded from RSO and merged in to provide the finished delivery notes - new data but formatted like the template.

The file that is downloaded holds the details for this particular 'shipment' and is named ***mailing_labels.doc*** Your merge template must be set to use this as it's data file.

It is best to keep the two files in the same folder, used exclusively for the mail-merges. This is then where you download the RSO file to and it keeps everything together.

8 Minimise the RSO window.

Open your 'Delivery Note' Word document and complete the merge in the usual way.

Tip
At this point you can make alterations to the delivery notes just like any ordinary document.

This can be useful to give extra information to the client, e.g. to note that something was out of stock.

9 Print the delivery notes

10 Close the delivery notes and the merge document.

DO NOT SAVE either document. They need to remain as they were ready for next time.

Items for Return

Purpose
Produces a list of items that require attention for return. e.g. to produce a list for a 'collection run'.

This feature does not make any changes to the bookings, it simply provides a list for information.

Information
The controlling factor for when items appear in this list is the 'Return Notice' value set for each 'Delivery Point' method.

Feature
If an item is not returned/collected on time, it will continue to be included in this list until it is returned.

This feature lists items currently out on loan to clients but are 'ready' for return, i.e. they are within their 'Return Notice' period as set for their specific Delivery Method

For example, if an item with a client has been booked with a Delivery Method called 'Internal Mail', and the Return Notice for 'Internal Mail' is 2 days, then this booking will appear in this list 2 (working) days before it's return date.

See page ??? for setting the Return Notice of delivery methods.

Items Overdue

Purpose

Lists all items that are currently overdue for return.

Can send automatic return reminder emails to clients.

Feature

It is possible to send reminders for only a few items if required - Useful if there are special circumstances with others.

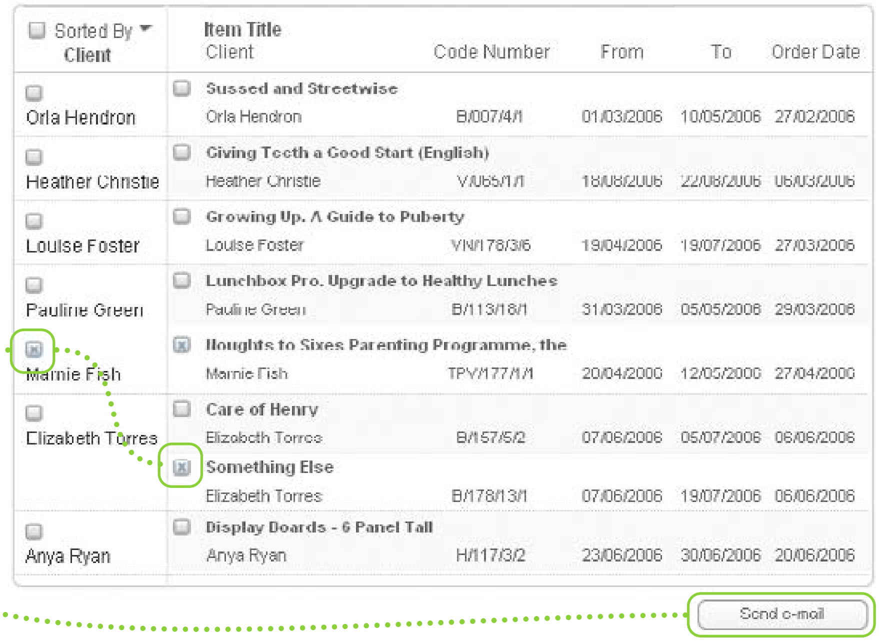
This page lists clients that have items overdue for return. The list is sorted by client name.

Both client and individual items have check-boxes that allow administrator to select them for action.

The text of the message is set in 'Misc > Mail templates > Warning mail'

1 Tick clients or individual items you want to send reminders to/about

2 Click the Send E-mail button



Sorted By Client	Item Title / Client	Code Number	From	To	Order Date
Orla Hendron	Sussed and Streetwise / Orla Hendron	B/007/4/1	01/03/2006	10/05/2006	27/02/2006
Heather Christie	Giving Teeth a Good Start (English) / Heather Christie	V/065/1/1	18/08/2006	22/08/2006	06/03/2006
Louise Foster	Growing Up. A Guide to Puberty / Louise Foster	V/V/178/3/6	19/04/2006	19/07/2006	27/03/2006
Pauline Green	Lunchbox Pro. Upgrade to Healthy Lunches / Pauline Green	B/113/18/1	31/03/2006	05/05/2006	29/03/2006
Marnie Fish	Thoughts to Sixes Parenting Programme, the / Marnie Fish	TPV/177/1/1	20/04/2006	12/05/2006	27/04/2006
Elizabeth Torres	Care of Henry / Elizabeth Torres	B/157/5/2	07/06/2006	05/07/2006	06/06/2006
	Something Else / Elizabeth Torres	B/178/13/1	07/06/2006	19/07/2006	06/06/2006
Anya Ryan	Display Boards - 6 Panel Tall / Anya Ryan	H/117/3/2	23/06/2006	30/06/2006	20/06/2006

Send e-mail

Future Bookings - Cancel

Purpose

Lists all bookings currently in the system, that have not yet been delivered.

- Allows selected bookings to be cancelled
- Allows bookings to be amended

Note

This list also includes bookings due to go out today.

It does not include back-order items.

Tip

The list of items is usually long so use the browser's 'find on page' function to locate a particular client or item.

This page lists all bookings and orders currently in the system - apart from:

- Items currently out with clients (in Return Items)
- Future back-orders (in Future Back-orders)

This page is often used just to check on a future booking or order, and no actions are required.

Any booking or order can be cancelled prior to delivery, even those due to go out today.

To cancel orders:

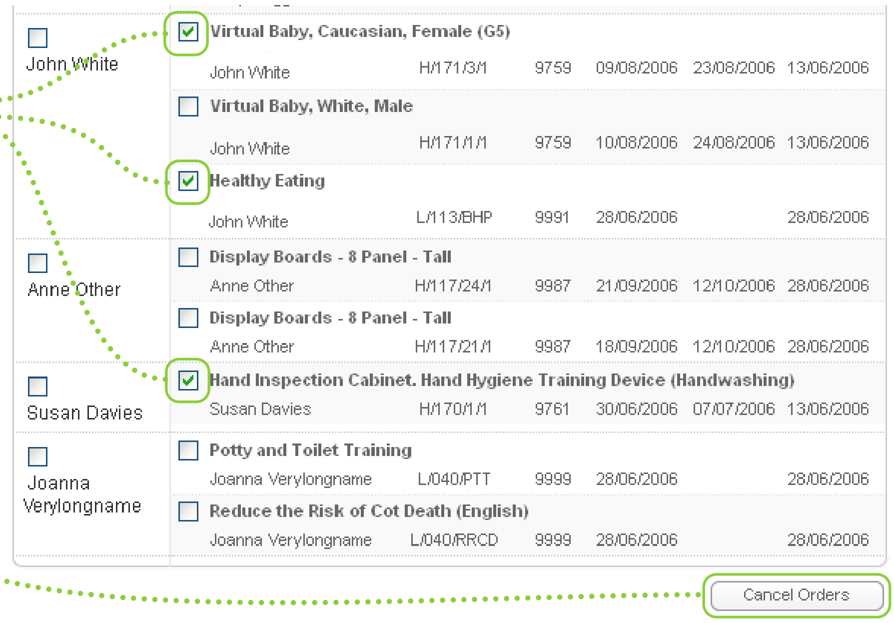
1 Tick orders and bookings that you want to delete

Note, all the clients with items deleted together will be sent the same message (see below).

If they need different messages then do them as separate delete processes.

2 Click cancel

The bookings are NOT cancelled yet

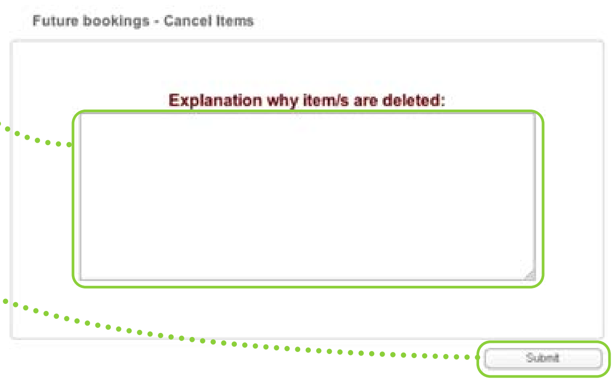


3 Type a message to explain why the items are being deleted

The basic message text is set in Misc > Mail Templates, but this text is appended to give specific details of this action.

4 Click Submit

The bookings or orders are deleted when this button is clicked.

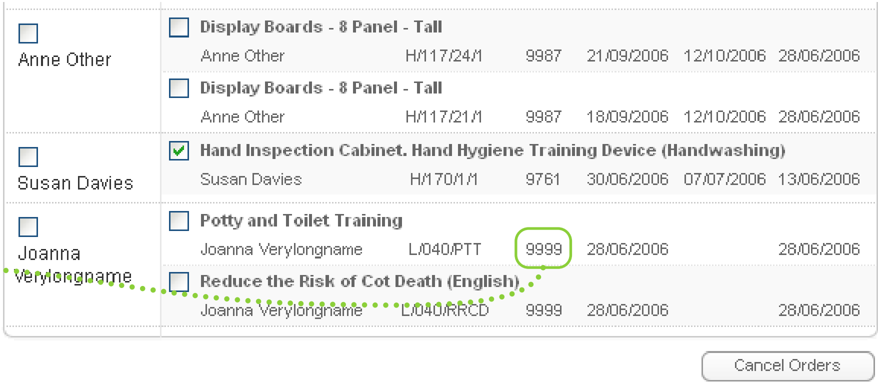


Future Bookings - Edit

Bookings and orders can be amended from this page.

1 Click the Order Number of a booking you want to change

You then get a booking calendar showing the booking's current details.



You can change one or more of the following...

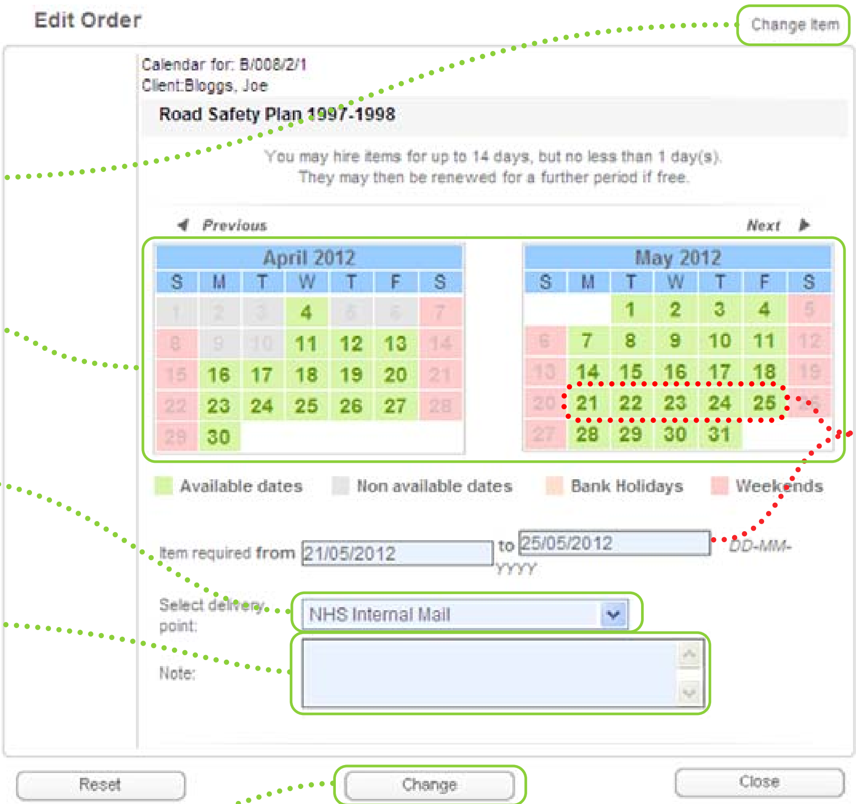
2a Click Change Item to select a different copy or completely different item

2b Click new calendar dates to change the dates of the booking

2c Click delivery method list to change the delivery option

2d Type in the Note box to add or amend any additional note

3 When the required changes are made, click 'Change' to save the changes



NOTE - The original booking is omitted from the calendar to allow different dates to be chosen if required.

Future Back Orders

Purpose

Lists all the back-orders currently in the system.

- Allows selected bookings to be cancelled
- Allows bookings to be amended

Feature

Items in this list transfer automatically to 'real orders' when sufficient new stock is available.

This page is only required for viewing, amending or deleting back-orders.

Tip

The list of items can be very long so use the browser's 'find on page' function to locate a particular client or item.

The process for cancelling or amending a back-order is the same as described earlier for an ordinary order.

Please refer to "Future Bookings" for details.

Future back-order bookings

Sorted By Client	Item Title / Client	Code Number	From	To	Order Date
Joe Bloggs	Drinkline / Joe Bloggs	L/077/DL	16/11/2005		16/11/2005
Sue Smith	Listening to Children - A Guide for Parents and Carers / Sue Smith	L/172/0729	12/12/2005		12/12/2005
Mary Bloggs	Menopause - Well Being of Women / Mary Bloggs	L/234/RCOMeno	19/12/2005		19/12/2005
Joe Bloggs	Weaning Your Baby Onto Asian Family Foods - Urdu Version / Joe Bloggs	L/109/URDU	21/12/2005		21/12/2005
Anne Other	Blood Pressure (Green Leaflet) / Anne Other	L/058/BPEBHA	26/06/2006		26/06/2006
	Cholesterol - Questions you've wanted to ask / Anne Other	L/058/CHOL	26/06/2006		26/06/2006
	Your Guide to Contraception / Anne Other	L/055/YGTC	26/06/2006		26/06/2006
Joanna Verylongname	Your Guide to Contraception / Joanna Verylongname	L/055/YGTC	27/06/2006		27/06/2006
	Some of your Bits Ain't Nice / Joanna Verylongname	L/170/SOYB	27/06/2006		27/06/2006
	Love, Sex and Relationships / Joanna Verylongname	L/214/LSR	27/06/2006		27/06/2006
	Just Eat More (leaflet) / Joanna Verylongname	L/113/JEML	27/06/2006		27/06/2006
	Just Eat More (Booklet) / Joanna Verylongname	L/113/JEMB	27/06/2006		27/06/2006
	Drinkline / Joanna Verylongname	L/077/DL	28/06/2006		28/06/2006
	Thinking of Getting P''''d Tonight / Joanna Verylongname	L/077/TOGPT	28/06/2006		28/06/2006

Cancel Orders

Booking of Items - 1 of 5

Purpose

To make bookings and orders on behalf of a client.

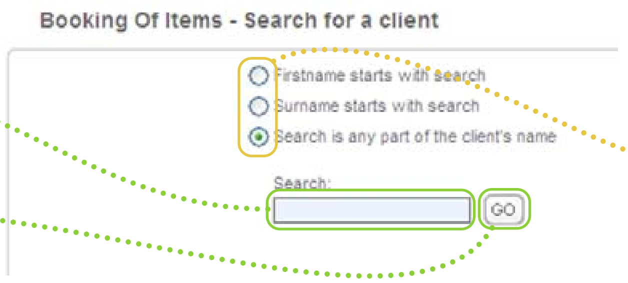
e.g. when a client visits the service in-person or is on the 'phone.

Feature

There are three variations of the bookings process:

- Standard - As on Client side
- Quick Book
  Assumes items are being taken today. Fills in today's date and automatically 'delivers' items on completion.
- Over the Counter -
  Like a shop check-out. Only requires input of item code numbers.

The first step is to select the correct client.



1 Enter part of the client's first OR second name.

2 Click GO (or press 'return' key on keyboard)

There are three search options.

The default 'any part' search is usually suitable

3a For Standard booking or Quick Book, click the client name you require.

Specific clients may be marked as 'Loan with caution'. Their names then show red in lists but everything else works as normal.

3b For Over the Counter mode click here

You have now selected the client to book/order for.

The next steps are to locate the items and book lending items and/or order supply items.

Booking of Items - 2 of 5

Standard and Quick Book

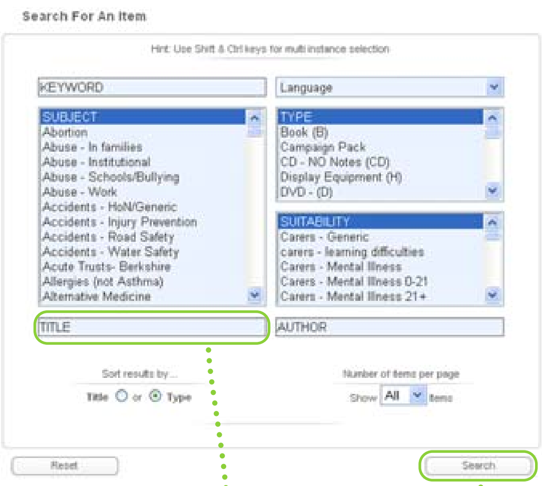
The next step is to find the item/s to be booked or ordered.

There are two main approaches, depending whether the client knows the particular items they want.

Known Item/s

If the client knows specific item/s that they want then it is best to search by title.

If they know an item but not the title, then use the Browse method.



1 Type PART of the title into the TITLE box

2 or 3 words should be enough, but they must be consecutive

TIP

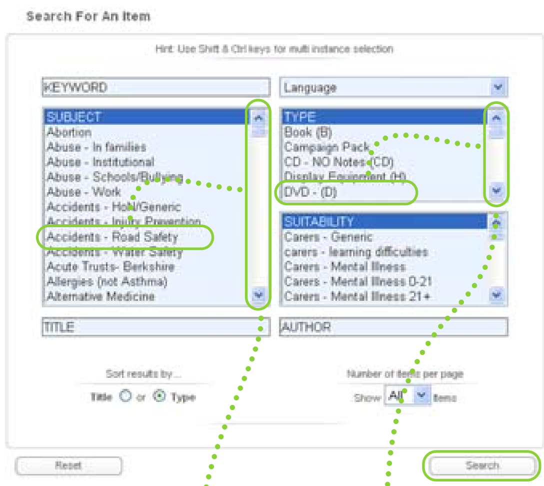
The search portion must be consecutive but can be from anywhere in the title.

- Avoid portions with punctuation as this may have been entered differently on the item.
- Choose the more distinctive words in the title as this will match with fewer items.

2 Click Search

Browsing

If the client knows the general topic but does not know specific item/s, then the best approach is to browse by subject.



1 Scroll down and click the topic of interest to highlight it

2 Scroll down and click the resource type of interest to highlight it

TIP

After selecting one item you can hold down the keyboard Ctrl key and select additional items

TIP

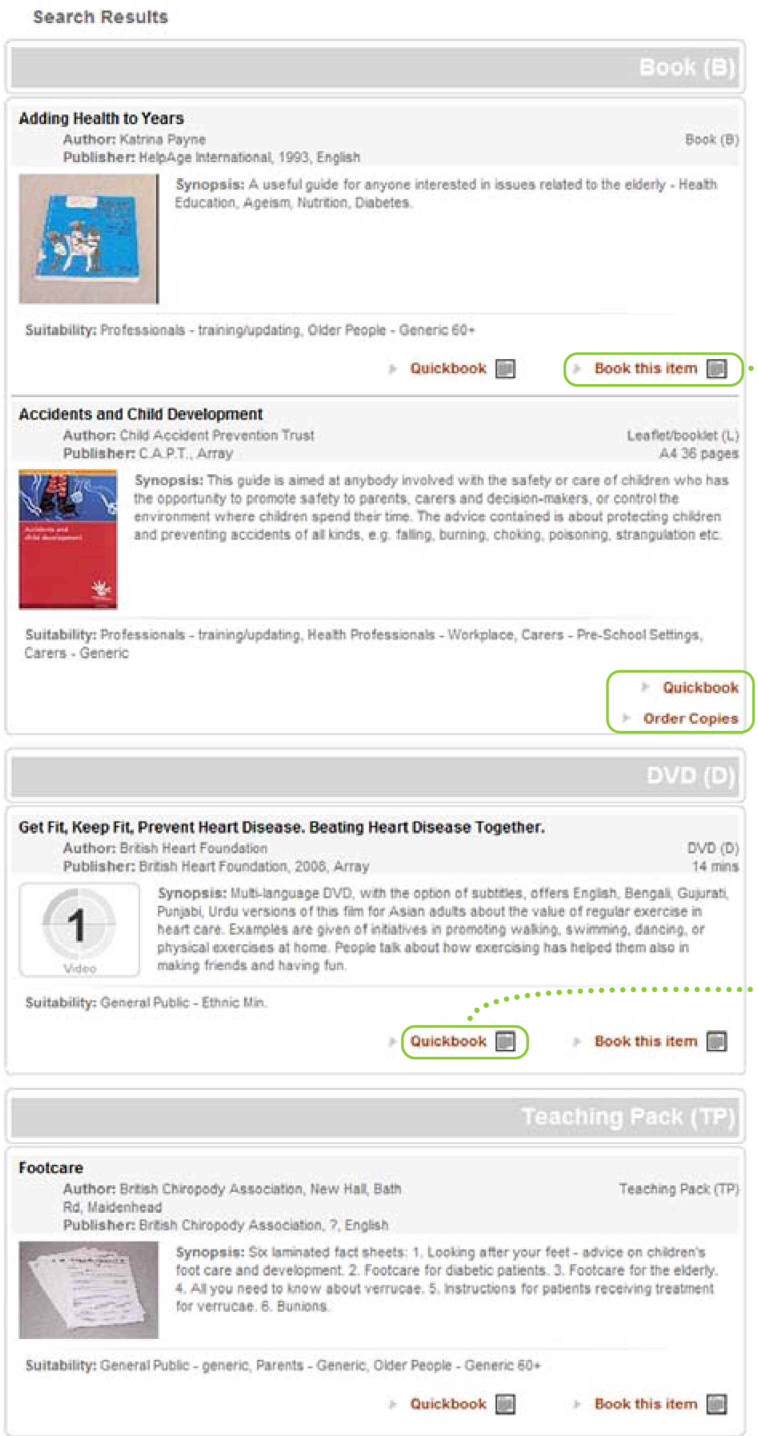
Browse by Subject is the simplest recommended search but many search options are available using the other list and text fields

3 Click Search

Booking of Items - 3 of 5

Standard and Quick Book

You will get a list of matching items like the example below.



1 To 'Standard book' an item click here

Standard

You have to select both 'from' (delivery) and 'to' (return) dates for the booking.

This is for bookings in the future.

1 To order a supply item click here

1 To 'Quickbook' an item click here

Quickbook

The start date is pre-set as today's date so you only need to select a 'to' (return) date.

This is for instant bookings where the item is taken immediately.

Booking of Items - 4 of 5

Standard and Quick Book

You then get a either a booking calendar window (lending item) or an order copies window (supply items).

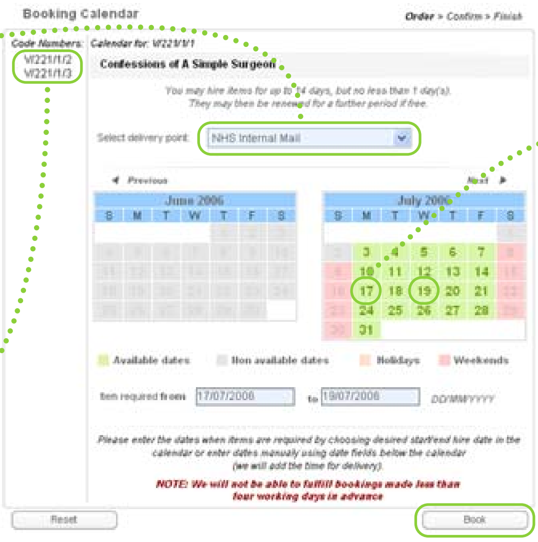
1 Check or select the delivery method required

This initially shows the preferred method chosen by the client so usually doesn't need to be changed.

You do this first as delivery times will affect the availability.

2 If required change item copy

If the calendar is not free for the dates you require, there may be other copies of the item that are free.



3 Click the date the item is required from - This is the date the client will receive the item

There is no need to allow for delivery time - the system allows for that.

If the dates are green then the item can be with the client.

4 Click the date the item is required until - This is the date the client must send the item back

5 Click 'Book'

Extend Hires

Purpose

To extend the booking period for an item currently out with a client.

Note

Hires can only be extended **during the last few days before the return date**. This period is set in Misc > System Data

This prevents bookings being extended at the start of a hire, making an unfairly long booking.

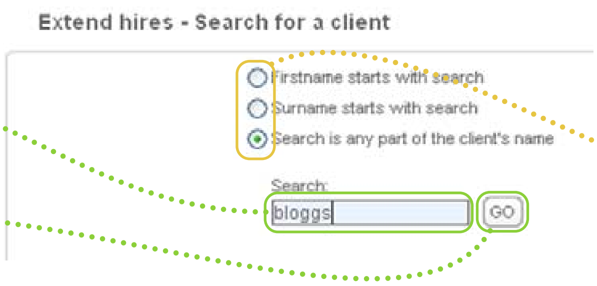
Feature

There is a custom limit for the maximum number of times a booking can be extended. This is set in Misc > System Data > Max Extendible

The first step is to select the client.

1 Enter part of the client's first OR second name

2 Click GO



There are three search options

The default 'any part' search is usually suitable

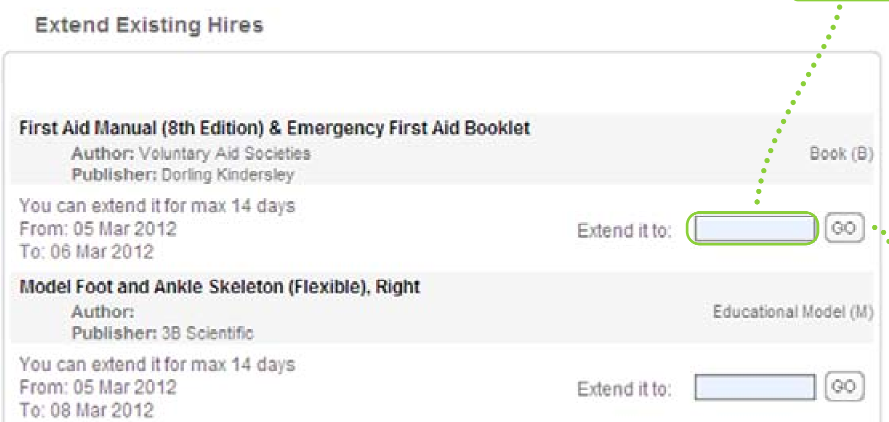
3 From the list of matches, click the client you require

The next screen will show all the items currently out with the client AND that are eligible for extending (in the final few days before return).

This list MAY BE EMPTY if there are no eligible items.

To extend a hire:

1 Click the date box of an item to extend. A calendar will appear.



2 Select the new return date on the calendar

The dark green dates are available to pick

The calendar will close and the date will go into the date box

Forward or back a month

3 Click GO

Current Issues

Purpose

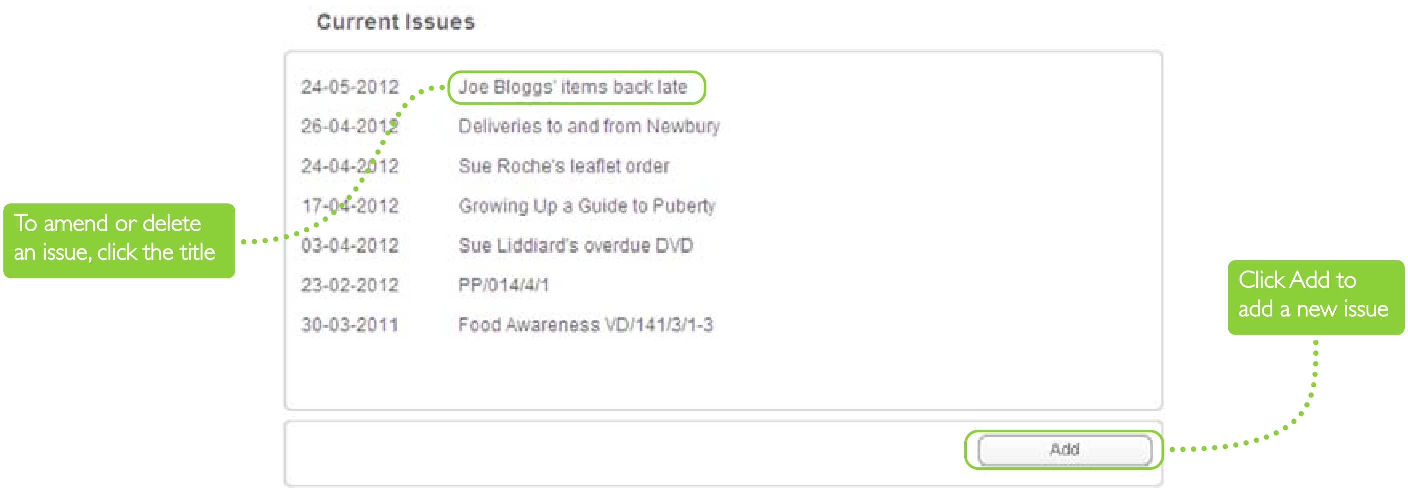
This is like a 'hand-over book' for admin. staff. It keeps a list of current topics with notes, so all staff can keep up to date on the issues. Any staff member can add to the notes as the issue develops.

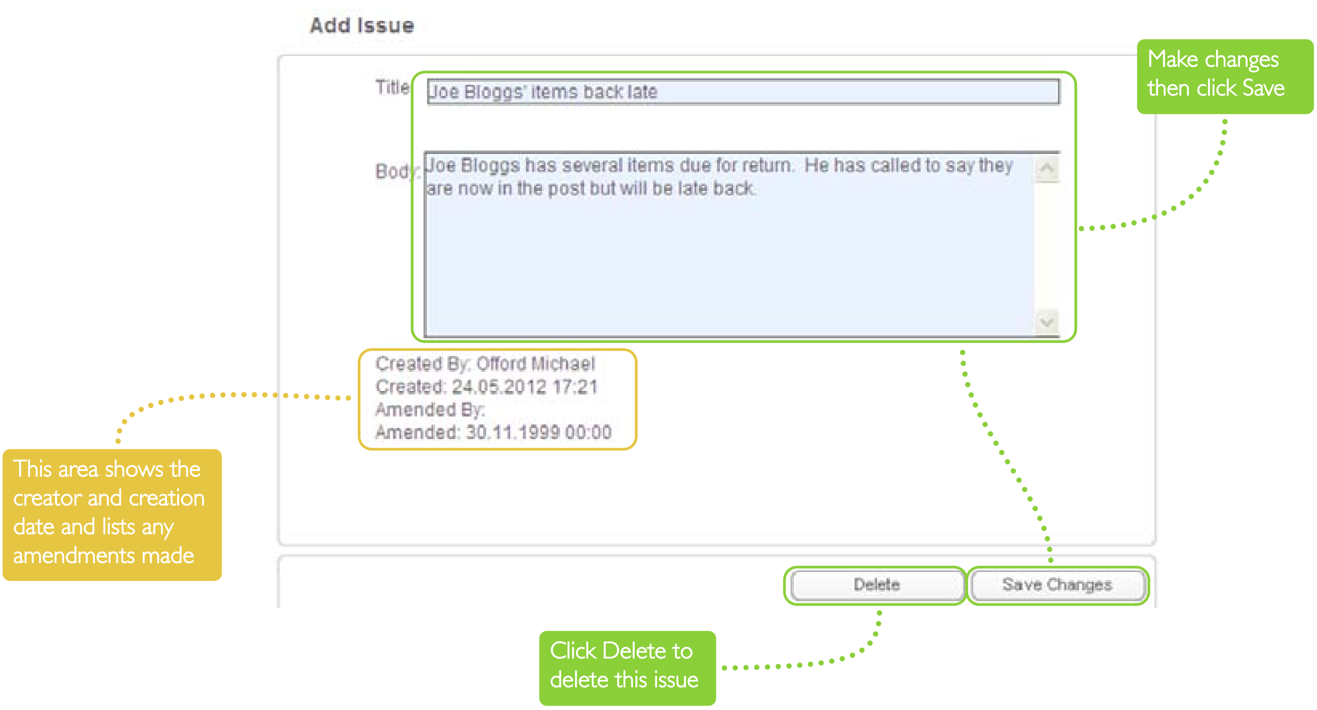
Feature

The current list of issues is also included in the TODAY panel on the Main admin page

This feature allows any staff member to log details of an 'issue' relevant to the running of the service.

The screen shows the list of current live issues. They can be amended, deleted, or a new issue added.





3. Item Management

Introduction

This section has the features for adding or amending the details of resource items.

There are just two functions:

- Add resource item
- Modify item

but there are a lot of additional functions within them, e.g.:

- List items of particular types
- View histories
- Amend copies of items
- Amend stock quantity of items
- Add/amend/remove item assets (previews)

and many more.

Add Resource Item 1 of 2

Purpose

To add a new UNIQUE resource item to the library system.

NOTE To add an *additional copy* of an existing item, use Modify Item, then Modify Copies/Stock.

Tip

Completing this form can take a while, so it is best to first enter the minimum information required and save it.

If you spend too long you could be 'timed-out' and lose the information entered.

1. Fill in as many of the boxes as you can. Those marked with two red stars ** must have something entered to be able to save the page and create the item.

2. The ‘drop down’ lists are pre-determined, being set up when first using RSO, but they can be edited in the ‘Misc’ section. Also some have 'Add' buttons to enable quick addition of items if required.

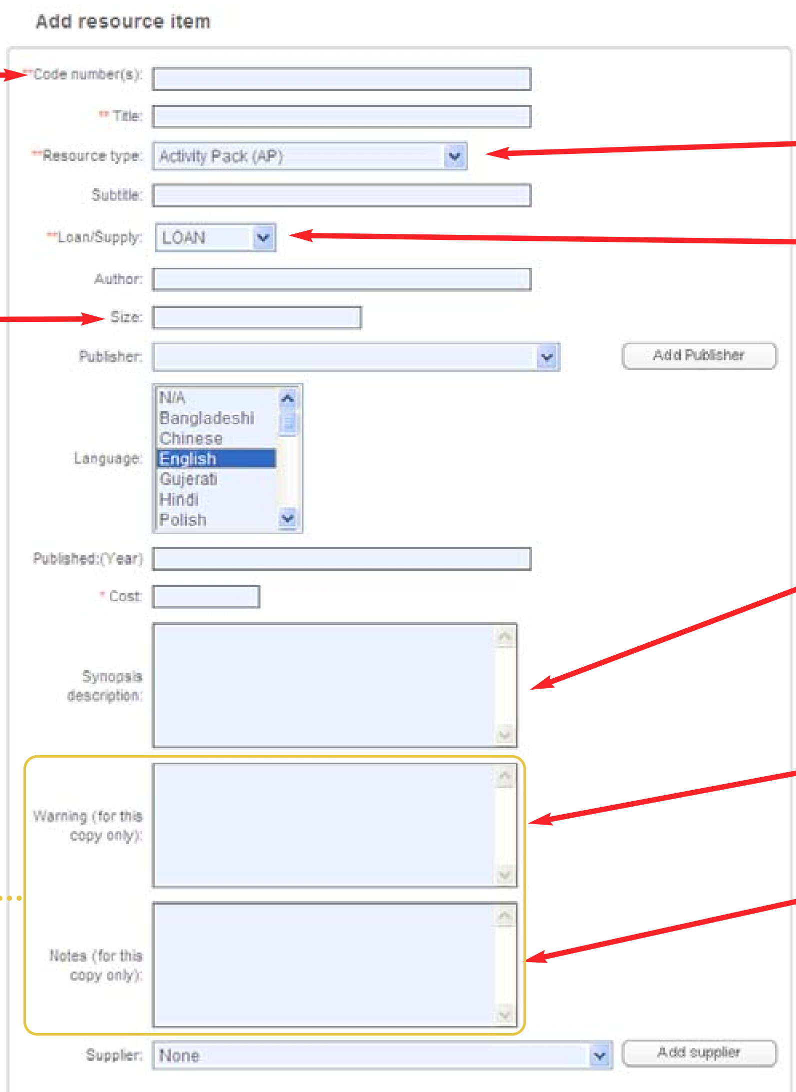
NOTE All of the details added here (apart from Code, Warning and Notes) apply to *ALL COPIES* of the item so should be common to them all. Additional copies are 'clones' of the main item and they all refer to these same common details.

Every item and copy must have a unique code.

When adding a new item, enter code for the first copy.

Size can mean different things depending on the type, e.g. duration of a DVD, height of a model, paper size of a leaflet, etc.

These two apply to each copy individually. On this Add Resource page it will refer to the first copy, being created here.



Drop-down Type list

Select relevant type

Over-all function type:

Loan - Booking calendar

Supply - Order qty.

Information - No booking/ordering possible

Description and overview of the item

This is the same for all copies

Individually per copy:

This Warning is shown in red at the top of the booking/order qty. window

Notes are for admin. staff only. Record additional information about the item for internal use.

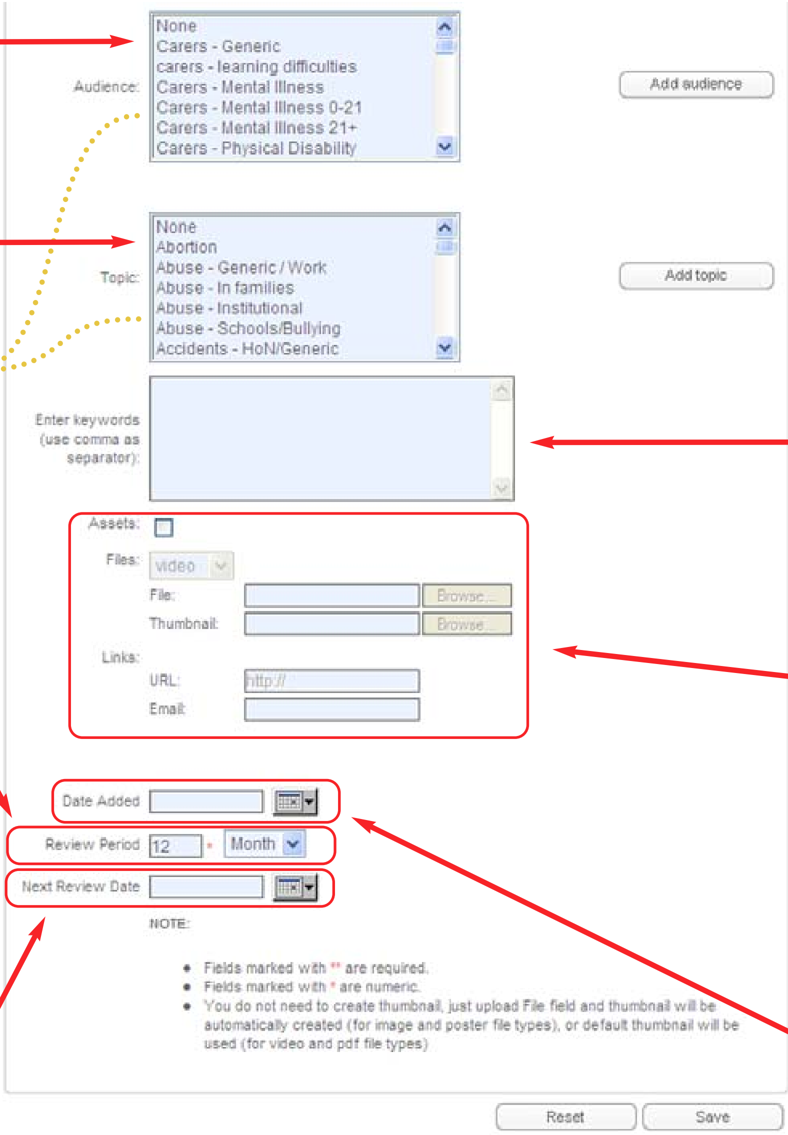
The Notes text can be searched to find particular items, so you can include special codes of your own.

Add Resource Item 2 of 2

Click to select an Audience group.

Click to select a Topic

With these lists, after selecting the first one you can hold the Ctrl key on the keyboard and select additional categories.



Enter a list of individual words relevant to this item and it's subject. They must be separated by a comma with no spaces.

These are important as it enables the Keyword search facility.

These boxes allow a preview (asset) to be added to the new item.

See Appendix 2 for details of adding assets.

TIP: Assets can be added later. Since they require preparation it is usually better to create the item and add assets later.

Select a period for the frequency of review required. Type a figure and select either Years, Months or Days.

Enter the date for the next review - Either type a date into the box (dd-mm-yyyy), or click the calendar button and select a date.

Enter the date the item was added to the system - usually today's date.

Either type a date into the box (dd-mm-yyyy), or click the calendar button and select a date.

Items requiring review are listed in the Reports > Items for Review report.

When marked as having been reviewed, this date is automatically advanced to the next review date.

Modify Item 1 of 4

Purpose

This function has three uses:

- To view the full details of an item
- To amend details of an item - including previews (photos, videos, etc.)
- To add a new copy (DUPLICATE copy) of an item

Note

Altering details on the screen WILL NOT CHANGE the stored records until the 'Save' button is clicked.

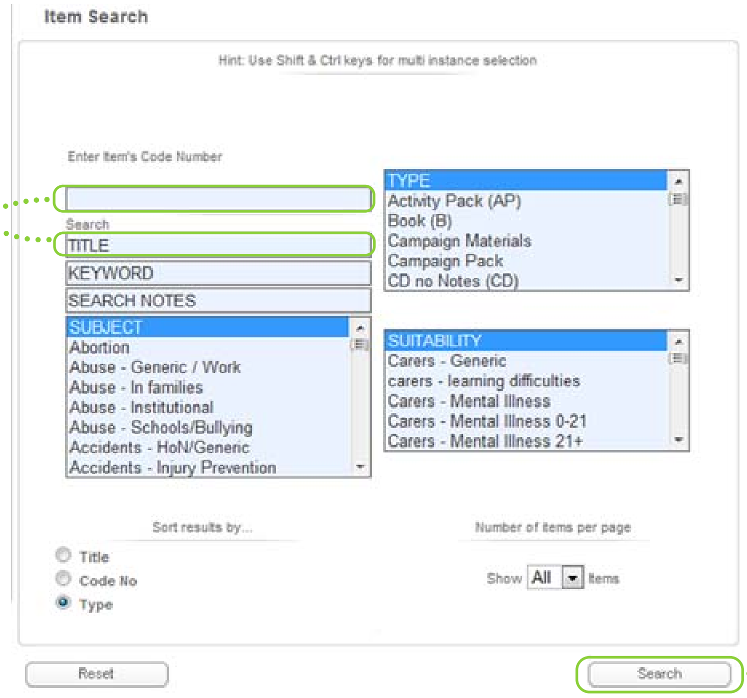
This page can be used simply to bring up and review the full details of an item, but it also allows details to be changed and saved.

The first step is to find the item to view or amend.

1 The usual search is by title or code number, to find a specific item

You can use the other, more general, search boxes to produce a longer list of items if required, e.g. all DVDs in a particular topic.

See Appendix I for more details on the search options.



2 Click Search

You will then get a search results page as shown on the next page.

You will get a results list similar to the example below. The length of the list will depend on what search method you used. Matching a title or code may list only one item.

Each item has a set of functions:

Edit
View and edit item's full main details

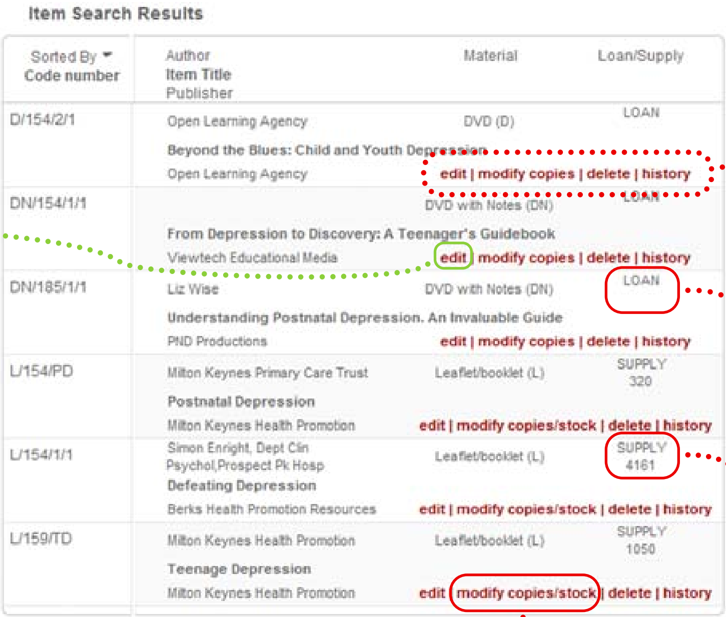
Modify copies
View and edit the details specific to individual copies

Delete
Delete this item and all copies

History
List the use history of the item

Click 'edit' to edit the full details of the item.

You will get an item details page similar to the page for Add Item, shown on next page.


Item Search Results

Sorted By Code number	Author / Item Title / Publisher	Material	Loan/Supply
D/154/2/1	Open Learning Agency **Beyond the Blues: Child and Youth Depression** Open Learning Agency edit | modify copies | delete | history	DVD (D)	LOAN
DN/154/1/1	**From Depression to Discovery: A Teenager's Guidebook** Viewtech Educational Media edit | modify copies | delete | history	DVD with Notes (DN)	LOAN
DN/185/1/1	Liz Wise **Understanding Postnatal Depression. An Invaluable Guide** PND Productions edit | modify copies | delete | history	DVD with Notes (DN)	LOAN
L/154/PD	Milton Keynes Primary Care Trust **Postnatal Depression** Milton Keynes Health Promotion edit | modify copies/stock | delete | history	Leaflet/booklet (L)	SUPPLY 320
L/154/1/1	Simon Enright, Dept Clin Psychol,Prospect Pk Hosp **Defeating Depression** Berks Health Promotion Resources edit | modify copies/stock | delete | history	Leaflet/booklet (L)	SUPPLY 4161
L/159/TD	Milton Keynes Health Promotion **Teenage Depression** Milton Keynes Health Promotion edit | modify copies/stock | delete | history	Leaflet/booklet (L)	SUPPLY 1050

Lending items are denoted by 'LOAN'

Supply items show their 'True' stock quantity.

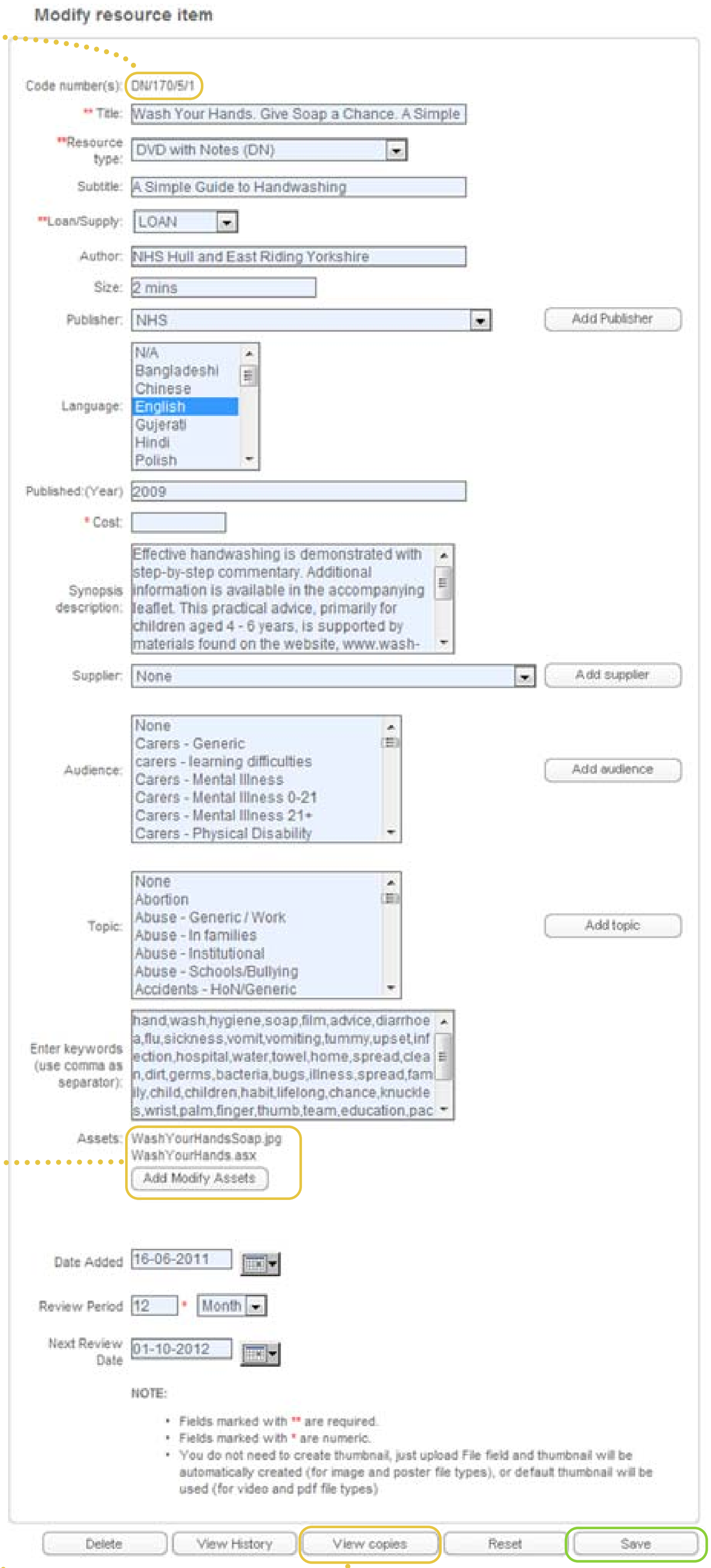
The 'True' qty is what is on the shelves now, not allowing for any pending orders in the system.

Supply items have a 'modify copies/stock' option.

This has additional facilities for amending the stock quantity of the item.

Modify Item 3 of 4

You will get an item details page like the example here. It is similar to the page for Add Item but with slightly different options.



Code numbers for all copies are listed here. They can be changed via the View Copies button below.

Any assets (previews) are listed here. Click the button to add or delete previews - See next section.

Click here to view or change details of all copies of this item - See next page

Note

Altering details on the screen DOES NOT CHANGE the stored records UNTIL the 'Save' button is clicked.

1 Change any of the details as required.

2 Click 'Save' to save the changes.

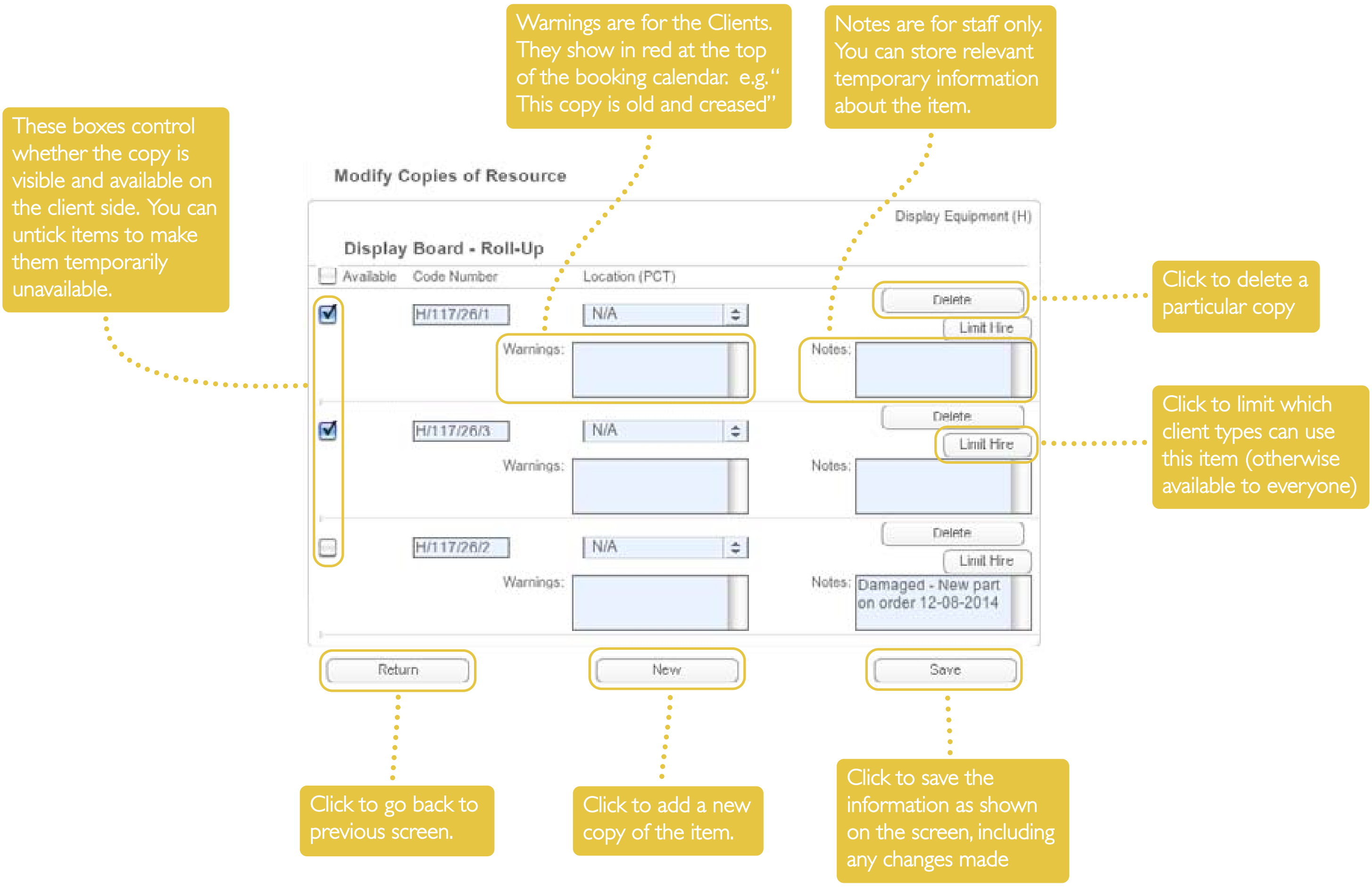
Modify Item 4 of 4

Modify Copies

The Modify Copies page lets you make changes to the particular physical copies of an item.

Every item has ‘core’ details which are the same for all copies (as set on the previous page) but can have several copies - these relate to the physical items. Each item will have at least one copy.

This page lets you record any differences between the copies.



Add/Modify Assets 1 of 3

Purpose

- Lists all assets currently attached to this item
- New assets can be added
- Assets can be removed

'Assets' are the additional information added to items, e.g. preview pictures, video clips, web addresses, etc.

Feature

It is possible to add:

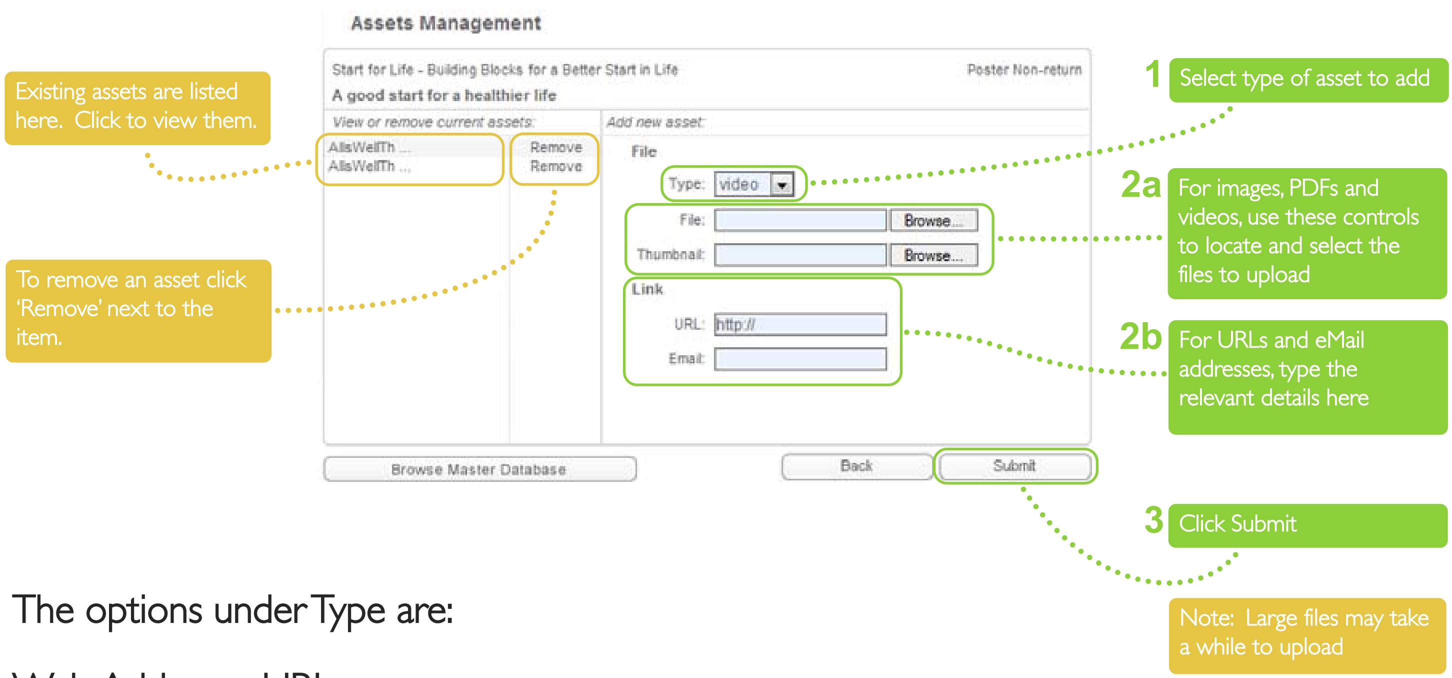
- Images/Pictures
- PDF documents
- Video clips
- Web addresses
- Email addresses

Tip

It is a good idea to keep a copy of the files you upload on a local disk. They may be useful for other purposes, e.g. item images for advertising.

Note

Most of the previews require files to be prepared before uploading them. Image files are relatively easy although you will require a photo editing program such as Photoshop. The PDFs and video clips require more technical knowledge and specialist software.



The options under Type are:

Web Address - URL

1. Select 'URL' in the Type drop-down list
2. Type in (or paste) the web address into the URL box, making sure the 'http://' remains at the beginning.
3. Click Submit button

Email Address

1. Select 'Email' in the Type drop-down list
2. Type in (or paste) the eMail address into the Email box
3. Click Submit button

Add/Modify Assets 2 of 3

Preview files should be within particular sizes, shapes, and file-size limits. These limits help keep the site responding quickly for the clients. Very large images and files will slow down the site and reduce usability.

Photograph / Image

Images consist of an image file plus a smaller 'thumb-nail' copy of it, both JPEG files. The thumb-nail is what initially shows in the catalogue. Clicking it opens the main image.

Specifications

Main Image

- Images should be 500 pixels high.
- They can be any width but must NOT be square e.g. the width matching the height.
- Format - JPEG image, approx. 30K to 60K bytes

Thumbnail Image

- Scaled-down version of full image (above)
- Its' maximum dimension must be 108 pixels - width or height, which ever is largest
- High quality JPEG format - RSO will compress the image as required so the original supplied here should be good quality.

Method

1. Obtain a photograph, e.g. upload from a digital camera
2. Open the image in a photo editing program, e.g. Photoshop, or MS Paint will do for simple edits
3. Adjust and improve the image as required, e.g. brightness/contrast, crop edges, etc.
4. Save the image as an original. It is useful to keep a full quality version of photographs for other uses.
5. Scale the image to 500 pixels high.
6. Save a copy as a JPEG image file, approx. 30-60 K bytes in size - This is the **main preview image** NOTE - Don't use spaces in the file name, e.g. FluVaccination2014.jpg
7. Scale the image down so it's maximum size (width or height) is 108 pixels.
8. Save a copy as a high quality JPEG image (file size not important) - This is the **thumbnail image** NOTE - It is best to name the file the same as the main file, but add '-tn' suffix to indicate that it is the thumbnail version, e.g. FluVaccination2014-tn.jpg
9. On RSO, find the item and use the 'Add Modify Asset' page (as shown previously) to upload the main and thumbnail images.

PDF Document

PDFs are best for leaflet previews. They also require a thumb-nail image of the front cover.

Specifications

PDF file assets can be used for two purposes:

- A quick preview of the leaflet
- A full-quality downloadable copy of the leaflet

File Size

- **Preview** PDFs should be limited to about 300K to 800K bytes so they load relatively quickly. The image quality will not be good and you may have to limit it to the first few pages of a document only.
- **Downloads** can be any size, as required, BUT you should advise of the file size in the item's Synopsis, particularly if it is very large and will take time (and possibly cost) to download.

Thumb-nail - As above for image thumb-nails

Method

1. Obtain a PDF of the leaflet.
2. If you can't get one you will have to scan each page, import them into a Word document and then export it as a PDF file. You will require a PDF generation program for this, e.g. Adobe Acrobat (full version). The final file should ideally be about 300-800Kb in size.
3. Rename the file to resemble the title, but don't use spaces, e.g. FluVaccination2014.pdf
4. To generate the thumbnail image, import the PDF into an image editing program, e.g. Photoshop or MS Paint
5. Choose only the first page (front cover).
6. Scale the image down so it's maximum size (width or height) is 108 pixels.
7. Save as a high quality JPEG image (file size not important) - This is the **thumbnail image**
   NOTE - It is best to name the file the same as the main file, but add '-tn' suffix to indicate that it is the thumbnail, e.g. FluVaccination2014-tn.jpg
8. On RSO, find the item and use the 'Add Modify Asset' page (as shown previously) to upload the PDF and thumbnail images.

Video Clip

The main limit on videos is file size - 2Mbytes maximum. The below settings give good results.

Specifications:

- WMV (Windows Media Video) format
- Size in pixels: 16:9 Widescreen: 282x162   4:3 Standard: 240x180
- Maximum file size of 2M bytes (will not upload if larger)
- Length: No limit, but the file size limit means a 5 to 6 minute clip produces reasonable quality

Misc (Miscellaneous)

Introduction

The Miscellaneous section has:

- Infrequently used features such as sending bulk emails
- Functions for viewing and changing the 'background' settings of the system

These functions let you view and change the settings of many things.

The full list of functions are:

System Data
Basic settings used by the system, such as: Max. lending period, Max. no of individual items allowed, Email reminder frequency, etc.

Mail Templates
Mail templates for the various automatic messages.

Suppliers
Your list of Suppliers.

Audience Type
Your list of audience types used when categorizing resource items.

Topics
Your list of topics used when categorizing resource items.

Holidays
For viewing and modifying calendar periods where delivery of items will be impossible, e.g. Christmas.

Delivery Points
Your list of delivery points/methods, e.g. NHS Internal Post.

Titles
Your list of personal titles for clients, e.g. Mr., Mrs., etc.

Job Types
Your list of possible client job types, e.g. Nurse, Health Visitor, Dentist, etc.

Locality Lists
Your list of client work localities, e.g. Reading, Slough, Newbury, etc.

Languages
Your list of possible languages used when categoriz-ing resource items, e.g. English, Greek, etc.

Resource Types
Your list of resource types, e.g. Leaflet/booklet, DVD, Book, etc.

Publishers
Your list of publishers used when entering new resource items, e.g. BBC Enterprises.

Send New Items Bulletin
For sending email newsletters, listing newly added items, to all clients .

Booking Window Message
Change or disable message on the Booking Window.

Type 3
Additional custom client type list that can be used if required.

Send Bulk-Email
Feature for sending an email to a set of clients in one go.

Editing Lists - Overview

Purpose
Lists all the elements in a particular list. Allows items to be added, modified or deleted.

Many lists are simple one-line items and the editing procedure is the same for all. This is described here.

Tip
You can not delete an item from the list if it is in use on ANY resource item or registered client.

Warning
You must be cautious when editing lists. If you change the meaning of an entry then items referring to it will need to be changed too, or others made to refer to the newly amended entry.

There are several lists used within RSO. They can be viewed and amended with the ‘Misc’ page functions.

These are mostly set up when you start using RSO, either manually or copied from your previous system.

Some lists are complex, having extra information and will be explained later, but the following lists are simple one-line lists and the procedure for editing is the same for all of them:

For Items

Audience Type
Possible audience or ‘target’ groups used when categorising an item

Topics
Possible topics/subjects used when categorising an item

Languages
List of possible languages used when categorising an item

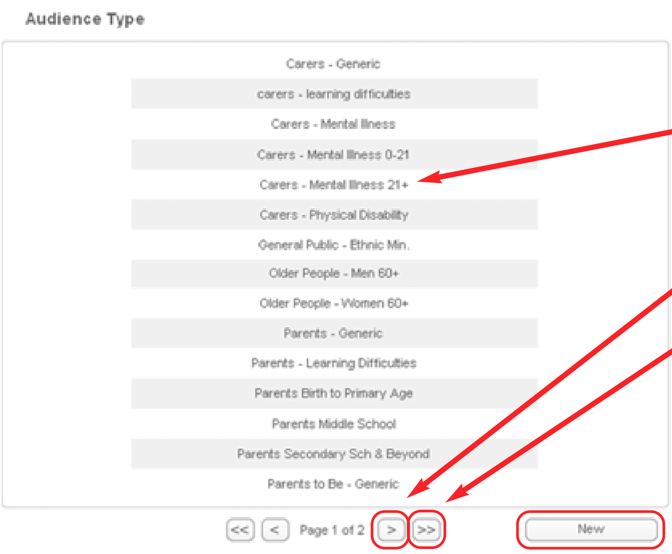
Resource Types
Resource types used when categorising items

For Clients

Titles
Possible titles for clients - Mr, Mrs, Dr, etc.

Job Types
Possible occupations for clients - used for producing statistics

Locality Lists
Working locations of clients - used for producing statistics



Click an item to edit or delete it.

Next window allows you to edit the text or delete the entry.

Next page

Last page

To add an entry click the New button
Enter text then click Save
Item is inserted alphabetically

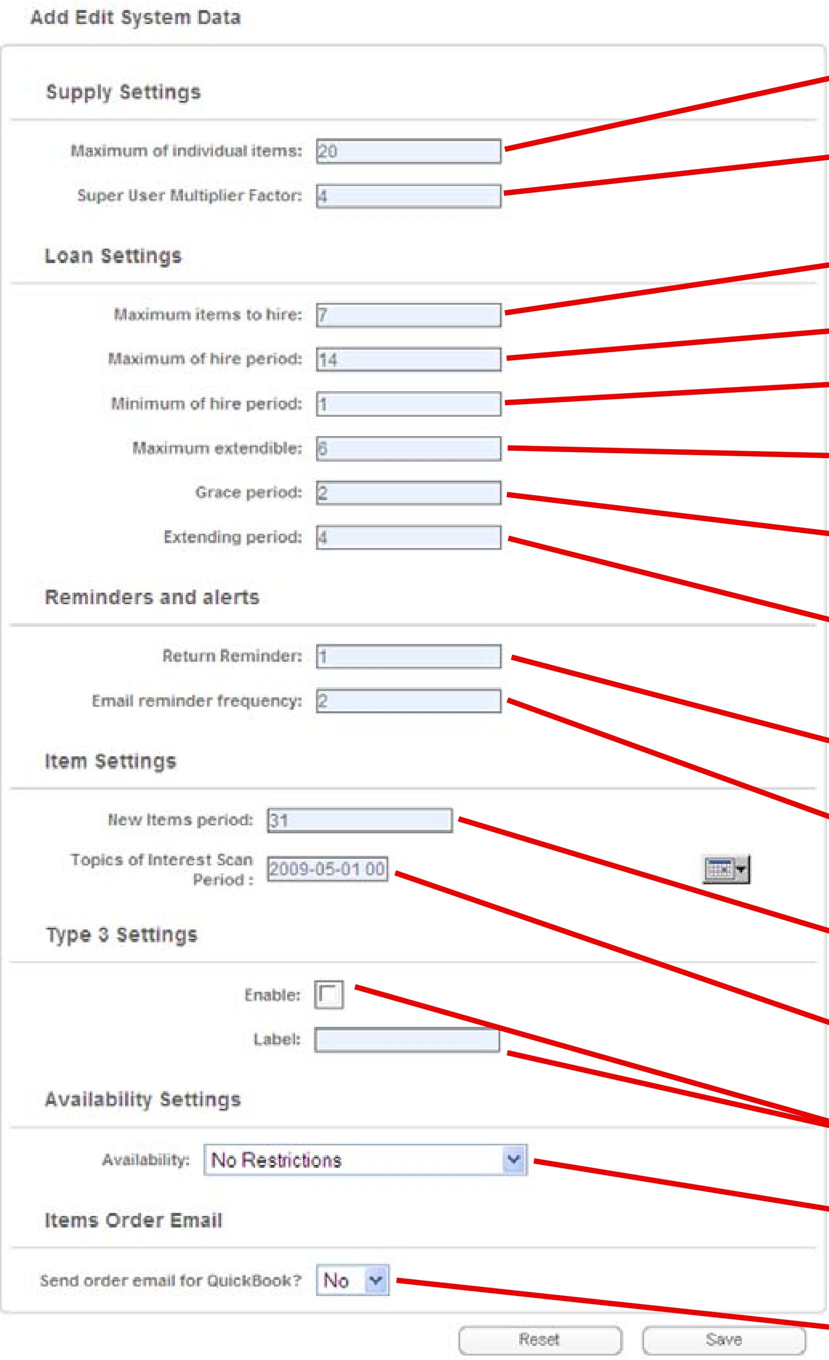
System Data

Purpose

Allows access to 'background' settings and values that affect the way the system works. They allow you to customise RSO to the way your service works.

Tip

Most of these are set during the set-up period and then rarely changed.



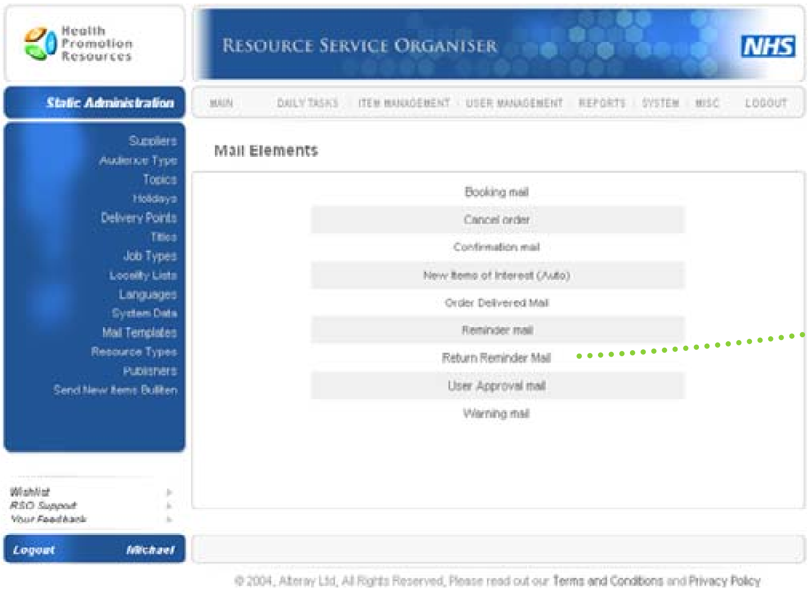
- How many different supply items (titles) a client can order at one visit
- For Super Users, the max. order qty for each supply item is multiplied by this
- How many different lending items a client can order at one visit
- Maximum duration allowed for a hire, in days
- Minimum duration allowed for a hire, in days
- Max. number of times a lending period can be extended
- How many days an item is late for return before it shows up as late
- No. of days before return, that an item can be extended - e.g. 4 here - can extend only during the last 4 days of the booking
- No. of days before return date that the Return Reminder email will be sent
- The reminder email is repeatedly sent this no. of days apart until it is returned
- How long, in days, an item is considered as new - Listed in Recent Items list and marked as 'NEW'
- Length of period scanned to create 'topics of interest' lists for the newsletter emails
- Enable and label third 'Client Type' field if required
- Set status of client catalogue - 3 levels: No Restrictions, View Only, Unavailable
- Whether to send booking acknowledgement emails to client when using 'Quick Book' method

Mail Templates

Purpose
- Lists the system mail message templates
- Allows them to be eddited

Note
The messages are linked to specific system actions so you can not add new templates.

Information
Most of these are sent automatically when certain actions happen, e.g. confirmation when receiving a client order. Others are sent only when requested.

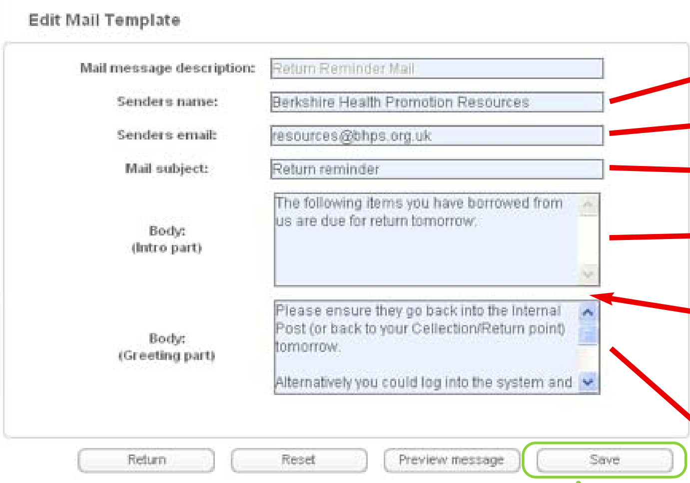


1 Click a template to edit

2 You will then see the edit page as shown below (boxes will be blank if initially setting up). Edit (or enter) the text as required.

TIP Choose the wording carefully, especially the subject and introductory text. Choose a subject that makes it clear what the message is about and easily differentiates between the templates. Remember, clients will be receiving many of these from you.

2 Edit the text in the boxes as required



Senders name - Usually your department name

Senders email address, usually your departmental address

Subject of message

Introductory part of message

The delivery address (if a delivery message) and the list of associated resource items is inserted between the two blocks, e.g. items just ordered, overdue, etc., depending on message.

NOTE Some messages don't have a list, e.g. registration confirmation

Closing part of message

3 Click Save to save any changes

Mail Templates

Here is the list of templates and which actions they are used for.

Mail Elements

Booking mail
Cancel order
Confirmation mail
New Items of Interest (Auto)
Order Delivered Mail
Reminder mail
Return Reminder Mail
User Approval mail
Warning mail

Booking Mail
Automatic - This is sent when a booking is completed, i.e. when the 'Send Order' button is pressed. It is sent both when a client has booked items or when admin. staff have booked items on their behalf.

Cancel Order
Automatic - This is sent whenever a booking is cancelled, either by the client or by admin. staff.

Confirmation Mail
Automatic - This is sent when a new client has registered on-line. It only confirms receipt of their details so they can not book items yet.

Order Delivered
Automatic - This is sent to clients when admin. staff have 'delivered' a client's booking/s. Your text should explain that there is still the delivery time to go, e.g. "should arrive in two days". It is particularly useful for clients using collection points as it informs them that they will be ready to collect.

Return Reminder Mail
Automatic - This is sent out just before the return date of lent items. The number of days can be set in System Data. It should tell clients that the item/s should be returned or extended.

User Approval Mail
Automatic - This is sent when admin. staff change a client's status from 'In Progress' to an active state, e.g. when their membership is accepted. It should be welcoming but is a good place to explain the most important points of using your service.

Warning Mail
When Requested - This is the message sent to clients that have items out overdue. It should request return or suggest extension.

Searching

Purpose

To select a range of items to display and work with.

Item search is required for several functions, both on Admin and Client side.

The exact options can be different, but this example shows the Admin > Modify Item search page since it has the most options.

Tip

In the lists it is possible to select more than one item. After selecting the first, hold down the ctrl key on the keyboard and select additional items.

Warning

The search options are linked by **logic AND** functions, so only items that match ***every*** selected criteria will be shown,

The more of them you use, the fewer items will match.

Several Admin. functions have a search page - where an item, or list of items, has to be produced to work on

You can use any combination of the options available. Any left unused are ignored for that search. Leaving them all unused would list EVERY item stored on the system!

This searches for matches within the items' Keyword data.

It will match with partial words, e.g. 'tablet' will match with 'tablets' (but not the other way round).

There is a logic AND between each keyword too, i.e. all words entered must be found for the item to be included.

Includes only items with this language highlighted.

Select specific item Subject/s *

Select specific item Type/s *

Select specific item Suitability/ies *

Searches for matches within the items' Title data.

Searches for matches within the items' Author data.

These look for exact matches *within* the text which means:

- Can be a section from the middle
- Does not have to be beginning or end of text
- Can even start or end with partial words

e.g.: 'e of you' would match with 'Some of your bits ain't nice'

* With these lists, once you have selected one category, you can hold down the keyboard CTRL key and select additional categories.

If more than one item is selected, then there is a logic OR function between the items selected within that list.

i.e. Selecting more categories will increase the number of matched items.